



CREATING A HIGH-PERFORMANCE ORGANIZATION AND COMPANY CULTURE

Executive Overview for:

The On-boarding Process to put new Associates on the Path to Success

*"An effective on-boarding process is not only critical to the development and success of the new associate but should be looked at as a continuation of the "Hiring process."
- YourBoard.US*

1. The successful "On-Boarding" Process.
2. Critical steps and considerations in the On-Boarding Process.
3. The 30-60-90 Day Development Period.



YOUR WEB-BASED BUSINESS ADVISORY BOARD

All content is intended for use by active YourBoard.US members only.
Any representation or re-use of this content outside of the YourBoard.US, LLC,
membership terms and conditions is strictly prohibited by law.

Even though you have done everything possible during the hiring evaluation and process there will still be some miss-hires. Who is to blame? You can either say nobody, or you can say both parties, or we can be honest and say the blame for most miss-hires is generally weighted toward the company who is doing the hiring.

Why? Unless someone consciously lies about their skills, experience, accomplishments or schooling, all of which should be smoked out during the interview, references and background checks, the blame for a bad hire usually is a result of not properly matching the position requirements with the candidates skill sets, attributes, attitude or the candidate's personal drivers and interest in succeeding in the position.

The truth is that the hiring company's management has a better observation point for what type of skills and attributes will be best suited for the position and the company culture, than does the candidate. The candidate does not have a real feel for that. The candidate wants the job, or perhaps any job, and may have more flexibility during the interviewing process than he will ultimately demonstrate. Having said that, while the interviewing process may be completed at the point where the candidate accepts the offer and begins work, the "True Hiring Process" will continue a while longer during the "on-boarding" process.

Fairness and ethics always come into play when it becomes obvious quickly that we may have made a miss-hire. That is why there are clear steps to the "on-boarding" process that should also be outlined in the company handbook, which is signed by the candidate, when he accepts the offer. The goal is always to support the candidate (now our new associate), to get up and running and on their way to a successful and gratifying career with our company. That is always our goal.



YOUR WEB-BASED BUSINESS ADVISORY BOARD

All content is intended for use by active YourBoard.US members only.
Any representation or re-use of this content outside of the YourBoard.US, LLC,
membership terms and conditions is strictly prohibited by law.

The On-boarding Steps

1. **There should always be a Day One Plan** which includes: a.) H.R.'s welcoming, b.) handbook overview and tax information type paperwork; c.) assignment of a "sponsor," ideally someone from the employee's department; d.) personal introductions to everyone with a written list of associates presented to the new hire so they know who they met and what position they have; e.) A tour of the facility; the bathrooms, the lunchroom, rules on parking and lockers, etc.) An overview of the business, and the market, and how their role impacts the business. Lunch with the manager or owner is critical. Toward the end of the day, the sponsor and/or manager should sit with the new hire and ask if they have any questions. There should not be any moments of dead time on the first day. The assigned sponsor becomes a buddy until the new associate forms their own relationships.
2. **Morning of Day 2.** This meeting is between the new associate, their direct supervisor and potentially a manager, or in a small company, the owner.

This is the meeting where the same RROI – Position and Performance Agreement that was presented during the interviewing process to outline the roles and responsibilities of the position, is re-visited in greater detail with the new associate. This is where all of the expectations, role objectives and initiatives, results and development and training plans are discussed in detail. The new associate is then asked to think about everything that is in the RROI and be prepared to ask any questions in a few days. It is important to be certain from the outset that there is joint and total understanding and agreement of the expectations of the role.

The new associate then moves on in the afternoon of the second day to begin their training or OJT and their new role with the company. Ideally, the person has experience with the processes that are key to their role. The "sponsor," who was originally assigned, should be part of the OJT for the position. It is important to have the right person assigned to the "sponsor" role. This first impression that the new candidate has of the company and its people, will set the tone and the performance bar for their future career with the company.



YOUR WEB-BASED BUSINESS ADVISORY BOARD

All content is intended for use by active YourBoard.US members only.
Any representation or re-use of this content outside of the YourBoard.US, LLC,
membership terms and conditions is strictly prohibited by law.

3. **The End of First Week Review**

At the end of the first week of employment, the new associate and their supervisor should meet as promised to see how the new associate is doing, and to see if there is any support they need. Again, go over the RROI- Position and Performance Agreement to see if, now that they understand the job a little better, they have any questions or adjustments they would like to recommend. We want to be certain that after the first week, neither the new associate nor the supervisor is concerned about any part of the match.

It would be expected that the supervisor would ask other people in the department, the process or a connected process how the new associate is doing before the one week meeting. Assuming everything is good, this information coming from the other employees becomes the initial point for appreciating and recognizing the new associate and giving them a boost after what was probably a big week for them. If there are some negative reports from other associates or the supervisor observed some potential issues, it is appropriate to do some "coaching" surrounded, at this point, with understanding and appreciation for their interest in correcting any issues.

I have observed many situations where well intended managers waited too long to address a problem with a new associate and found out later, after much time had been wasted and a termination resulted, that several people said "We could have told you immediately that the new associate was not going to work, but you never asked."



YOUR WEB-BASED BUSINESS ADVISORY BOARD

All content is intended for use by active YourBoard.US members only.
Any representation or re-use of this content outside of the YourBoard.US, LLC,
membership terms and conditions is strictly prohibited by law.

The first week review delivers three important results.

- A. The supervisor has the opportunity for the third time (initial interview, 2nd day and first week) to discuss the importance of the expectations for the role as laid out in the RROI- Position and Performance Agreement. Subsequently, there should never be a question of what is expected of the associate in each role.

- B. It is a good idea to informally bring together the other associates (in a small group or one-on-one) that are working in the department or processes where the new associate is assigned, with the goal of helping to understand any support that may be needed for the new person to be successful. This promotes teamwork. In some cases, the involvement of others, prior to the one week review, will uncover situations and issues that are only going to get worse with time if not dealt with.

- C. This first week review, in most cases, will serve as an appreciation and recognition session for having done well in adjusting to the new position the first week. This will motivate the individual to work even harder the second week to master the new position and will be the beginning of creating the “High Performance Recognition Based Culture” for this new associate.



YOUR WEB-BASED BUSINESS ADVISORY BOARD

All content is intended for use by active YourBoard.US members only.
Any representation or re-use of this content outside of the YourBoard.US, LLC,
membership terms and conditions is strictly prohibited by law.

4. **Conduct an initial 30-60-90 Day Development Plan for every new associate.**

The 30- and 60 day reviews as called for and detailed in the Handbook, follow pretty much the same format as the first week review, only as time goes on the new associate's performance level becomes more evident.

Each of the 30- and 60-day reviews include:

- A review of the RROI – Position and Performance Agreement just to be certain the commitments made, and initially agreed to, are understood now that the new associate has been in the position for some time.
- A discussion of any needed support or training (After the supervisor has spoken to the sponsor and other associates working with the new associate.)
- A point to appreciate and recognize, or in some cases coach, if there are signs of underperformance.

It is generally not a good idea to promote a new associate in the first 90 days, during the 30-60-90 day "development period". You should also never call this initial 90-day development period a "Probation period. A very "quick" promotion of a new hire, unless it was pre-planned and communicated to the Team, can be a de-motivator for anyone who felt they should have been given first consideration.

- On the other hand, if coaching has not been accepted, skill levels are much lower than thought to be, aptitude to improve skills is not evident, there are required personal attributes that are not being demonstrated or negative behavioral attitudes that were not picked up during the hiring process that are now becoming evident, it is definitely appropriate to go off of the 30-60-90 Day Development Plan, at any time, and move directly to a "Get Well-Recovery Plan" with a much shorter time span (1 week) in which things must be corrected.

Under normal circumstances, by the 90-day point (and considering all of the other steps we have taken at 30 and 60 day intervals) we should know if the new associate has the skill set, aptitude, attitude and desire to either continue to improve to the level of an "exceptionally good associate" or not. Hopefully, by the 90-day point, the new associate has met or exceeded all of the expectations and everything is a go.



YOUR WEB-BASED BUSINESS ADVISORY BOARD

All content is intended for use by active YourBoard.US members only. Any representation or re-use of this content outside of the YourBoard.US, LLC, membership terms and conditions is strictly prohibited by law.

A successful 90-day review does not mean a contract for life. It does mean that both the company leaders, managers and supervisors think that the expectations of the role can be successfully met or exceeded based on the first 90 days of demonstrated performance. The 90-day review, done properly, becomes a celebration and a clear recognition point that the new associate has what it takes to be a part of our great company and our High-Performance Company Culture.

A Completion Certificate for having passed the 90 Day Development Period, a dinner with spouse, a lunch or whatever else is appropriate based on the level of the position is a sincere form of appreciation and recognition and should be a part of this 90-day milestone.

There are situations where after 90 days the demonstrated performance, in spite of coaching and training, has not matched up with the requirements of the position.

Do not proceed with the 90-day Development Completion Certificate and celebration if there are still open issues or concerns, but instead discuss with the associate that everyone would benefit from an additional period of time (probably 30 more days) in the development plan.

Following the additional 30 days or at the point of 120 days, a final decision must be made regarding the future of the new hire. If the decision is to separate, refer to the Business Solution Segment on Termination.



YOUR WEB-BASED BUSINESS ADVISORY BOARD

All content is intended for use by active YourBoard.US members only. Any representation or re-use of this content outside of the YourBoard.US, LLC, membership terms and conditions is strictly prohibited by law.